

MAGAZINE TRAVEL CONVERSION STUDY

Final Report of Findings

our study # 7-051

October, 1998

MAGAZINE TRAVEL CONVERSION STUDY

Final Report of Findings

Wendt Advertising
and
Travel Montana

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NOTES TO THE READER

REVIEW THE QUESTIONNAIRE

A copy of the questionnaire is included in the Appendices. Readers are encouraged to review it before reading this report. The question numbers have been included in the graphs for easy reference to the questionnaire, but to improve readability, the graphs include paraphrased, more readable versions of the questions and answer categories.

UNDERSTAND THE STATISTICAL INDICATORS

Statistical tests (t-tests, f-tests, and ANOVAs) were performed on the data to uncover findings related to group differences and trends. Statistical indicators called “*p*”-values are used in the text of this report to indicate the statistical significance of these findings. The smaller the “*p*” value, the more statistically significant the test result. The “*p*” value measures the reliability of the result, estimating the probability that the outcome has occurred by random error or chance.

A “*p*” value of .05 or smaller is considered statistically significant, with smaller values connoting more reliable effects. If the text indicates that a finding is “significant,” but does not report a particular “*p*”-value, that means that the finding is significant at the $p < .05$ level.

Occasionally, analyses will be conducted to determine the difference between groups of variables. In this case, a number of “*p*” values will be indicated and denoted as “*ps*”.

HIGH VALUES REFLECT MORE POSITIVE RESPONSES

The interview contained a mixture of response scales. For some, the lowest value (e.g., 1) represents the most positive response (e.g., “yes”), and for others the highest value (e.g., 5) represents the most positive response (“extremely important” or “extremely satisfied”). To enhance interpretation ease, ALL responses are recoded after data collection so that the highest scale value represents the most positive response. This “reflection” process does not alter the data, but makes interpretation more consistent with the verbal description of the findings.

PAY ATTENTION TO THE “Ns”

When evaluating the results, take into consideration the total number of respondents who answered the question. The percentages and means derived from small sub-samples are less stable than from larger samples or “Ns.” Nonetheless, statistical tests take strongly into account the “N;” therefore, a significant finding of $p < .05$ is as reliable for a small sub-sample as for a large “N.”

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EXECUTIVE SUMMARY

The purpose of this study was to assess the effectiveness of the 1998 tourism promotion program advertised in magazines in generating visitors to Montana during the Summer 1998 travel season. More than 2100 persons who requested information about Montana either by phone or via reader card were interviewed. Analysis of demographics revealed relations to travel behavior.

The Mass Media segment had the lowest cost per inquiry and the best return over costs.

Mass Media conversion rate was one of the best segments, and, because of low cost-per-inquiry rates, this segment had the best rate of return (revenue over advertising costs).

The Trip Planning segment (Rand McNally Atlas) had the best conversion rate.

Almost 31% of those who called the 800-number from the Atlas actually made a trip to Montana. This segment also had one of the highest amount spent per party averages.

There is similarity in conversion rates among the publications.

There were very few standouts, and only a couple of underachievers.

Cost per inquiry seems to be a good measurement of eventual travel intention.

Because conversion rates were similar among the publications, it is a good assumption that those publications that can generate inquiries about Montana can be expected to generate travel as well. Several publications not measured in this study all suffered from low inquiry rates.

The conversion rates seen in this study can be considered very good.

The rates are in the range of what we saw in last year's PI/TV Conversion Study, and similar (or a little better) to other rates for other states.

Profile Of The “Typical” Montana Vacationer

Based on the survey data, a profile of the “typical” Montana visitor would show:

- They made their decision to travel **before** ordering travel information.
- They were extremely satisfied with the travel information they received, and in a few cases respondents said the information resulted in a longer visit.
- For slightly more than half, Montana was their **primary** destination.
- They were in their mid-50's, with considerable income and no children living at home.
- They were most likely to visit in the summer.
- Their average stay was about 5 ½ overnights, usually in a motel or hotel.
- They spent \$143 per day and about \$791 per traveling party.
- Previous visits to Montana were indicative of subsequent visits.
- They are likely to return, probably in the next two years, and showed an interest in a future trip that followed the Lewis & Clark Trail.

INTRODUCTION

Travel Montana and Wendt Advertising wish to improve the performance of advertising for Montana tourism. Over the winter and spring of 1998, advertisements were placed in various magazines in order to entice potential visitors to Montana. These ads typically ran between February and April and contained a toll free number for interested people to call, and/or a card that could be returned to the publisher requesting travel information about Montana.

Study Purpose

The purpose of this study was to assess the overall effectiveness and efficiency of the 1998 magazine advertising Summer campaign. In order to do this effectively, we compared the number of inquiries to the number of converted travelers for each segment, or in some cases for a specific magazine. We also examined the demographic profiles of travelers and non-travelers to measure the effectiveness of the advertising campaign.

Survey Method

Clearwater Research used a computer-aided telephone system (CATI) to conduct interviews because of its quick turnaround time, accuracy, and efficiency. We used a 60-station, state-of-the-art CATI system, and a staff of highly trained interviewers. They were thoroughly briefed prior to data collection and rehearsed the questionnaire before conducting actual interviews. Monitoring staff listened to a sampling of interviews continuously throughout the project to maintain data quality. Clearwater Research uses computer-assisted dialing, but *not predictive dialing*, because predictive dialing annoys respondents and causes hang-ups by introducing a delay in interviewers' connection to respondents after respondents answer the phone.

The Survey Instrument

The questionnaire was designed by Clearwater Research, Inc. in cooperation with Wendt Advertising and Travel Montana. Questions were designed to determine if the individual who requested the travel information visited Montana. If they did visit, they were asked a series of questions about their visit. If they did not visit, they were asked questions about why they did not travel to Montana. All respondents were asked if they used the Internet for travel plans as well as demographic questions. A copy of the final questionnaire is included in Appendix C.

Sampling, Interviewing, and Analysis

The client provided a database of potential travelers who called the 800-number or sent in reader card requests for Travel Montana information. A phone matching service provided phone numbers for these lists.

The sample was sorted by magazine segments. Each segment contained several magazines. The traditional segment was broken into subsections based on the type of magazines. In addition, Food and Wine was treated separately in order to provide detailed information about the performance of that magazine. The segments, subsections, and magazines are listed below.

Traditional Segment:

TS 1 - Travel

Amtrak Empire Builder
Conde Nast Traveler
Endless Vacation
Travel & Leisure
Travel Holiday
Vacations

TS 1A - Airline

Horizon Air
NW World Traveler
Spirit

TS 1B - AAA

Journey
Rocky Mountain Motorist
Via

TS 2 - Regional

Alaska
Atlantic Monthly
Minnesota Monthly
Natural History

TS 3 - Home/Living

Country Home
Country Living
Family Fun
Ladies Home Journal
Martha Stewart Living
Parents
Sunset

TS 4 - Food

Food & Wine
Gourmet
Saveur

Active Mature Segment:

Mature Outlook
New Choices
Travel 50
Travel America
Wild Bird
Yankee

West Hist & Culture Segment:

American Heritage
Country America
Historic Traveler
Home & Away
National Geo
Preservation

Outdoor Enthusiasts Segment:

OE 1 - Active Male

Adventure Journal
Men's Journal
Outdoor Life
Western Outdoors

OE 2 - Other Enthusiasts

Backpacker
Sierra
Snow Country
Outside

Mass Media Segment:

Life
Midwest Vacation Guide

Trip Planning Segment:

Rand McNally

The sample was also broken into type of inquiry: either telephone or reader card. Overall, 74% of the inquiries in the sample were reader card, although that varied from 0% - 98% depending on the magazine.

The main focus of the study was to determine the "conversion rate" of those persons inquiring about Montana travel information. Conversion rate is the percentage of those who request information who actually travel to or through Montana.

The data described in this report were collected from September 8 through September 22, 1998. Interviewing was conducted weekdays from 5:30 p.m. until 9:15 p.m., Saturdays from 10:00 a.m. until 4:00 p.m., and Sundays from 2:00 p.m. until 8:00 p.m. (all respondent's local time).

A total of 13,471 dialings were made to complete 2106 interviews. The average length of the interview was about 4 minutes for non-visitors and 7 minutes for visitors. The final call outcomes (final call dispositions) are listed in Appendix B.

FINDINGS

The study follows this outline:

- (1) Conversion results from the survey;
- (2) Characteristics of those who did and did not travel to Montana

In general, results appear in the order of the questions asked. Statistical tests (t-tests and ANOVAs) were conducted with the data to discover trends and significant differences among the respondents and their responses. Statistically significant differences are noted as such.

Inquiries and Conversion Rates

Mass Media Generates the Best Value

In this section we examine the effectiveness of the magazines in several categories:

- cost per inquiry
- estimated conversion rate – the generation of travel to Montana
- estimated cost per visitor
- estimated return over cost.

Table 1 shows the cost per inquiry for each of the 13 advertising segments. This chart includes those segments not surveyed such as Photography, Golf, and Emerging Markets (these are marked in a light blue). For those segments that were part of the survey, the estimated conversion rate and cost per visiting party are shown.

Table 1: Cost per Inquiry (CPI), Conversion Rate, and Cost per Visiting Party

| Publication / Segment | Cost | Inquiries | CPI | % of Inquires | % of Cost | Conv. Rate | Est. Visiting Parties | Cost Per Visiting Party |
|--|---------------------|----------------|-------------------|---------------|---------------|--------------|-----------------------|-------------------------|
| Traditional Audience: | | | | | | | | |
| Segment One - Travel | \$123,209.00 | 9,131 | \$13.37 | 8.76% | 15.87% | 23.0% | 2100 | \$58.67 |
| Segment Two - Regional | \$25,762.00 | 4,149 | \$6.21 | 3.98% | 3.32% | 19.3% | 801 | \$32.17 |
| Segment Three -- Home/Living | \$106,105.00 | 14,399 | \$7.37 | 13.82% | 13.66% | 23.1% | 3326 | \$31.90 |
| Segment Four -- Food | \$23,584.00 | 2,659 | \$8.87 | 2.55% | 3.04% | 19.0% | 505 | \$46.68 |
| Total Traditional Segment: | \$278,660.00 | 30,338 | \$9.15 | 29.11% | 35.88% | 21.1% | 6732 | \$41.39 |
| Total Photography Segment: | \$25,245.00 | 1,123 | \$22.48 | 1.08% | 3.25% | | | |
| Total Active Mature Segment: | \$45,514.00 | 12,264 | \$3.71 | 11.77% | 5.86% | 22.7% | 2784 | \$16.35 |
| Total W. Hist./Culture Segment: | \$170,972.00 | 25,178 | \$6.79 | 24.16% | 22.02% | 24.7% | 6219 | \$27.49 |
| Active Male Segment | \$16,925.00 | 1017 | \$16.64 | 0.98% | 2.18% | 31.8% | 323 | \$52.33 |
| Other Enthusiasts Segment | \$92,469.00 | 7069 | \$13.08 | 6.78% | 11.91% | 21.3% | 1506 | \$61.41 |
| Total Outdoor Segment: | \$109,394.00 | 8,086 | \$13.53 | 7.76% | 14.09% | 22.4% | 1829 | \$59.81 |
| Fishing Segment (part of Outdoor) | \$6,845.00 | 212 | \$32.29 | 0.20% | 0.88% | | | |
| Total RV/Camping Segment: | \$15,302.00 | 792 | \$19.32 | 0.76% | 1.97% | | | |
| Total Golf Segment: | \$43,257.00 | 531 | \$81.46 | 0.51% | 5.57% | | | |
| Total Emerging Markets: | \$59,375.00 | 4,337 | \$13.69 | 4.16% | 7.65% | | | |
| Total Mass Media: | \$19,800.00 | 12,401 | \$1.60 | 11.90% | 2.55% | 25.3% | 3137 | \$6.31 |
| Total Other Programs: | \$2,237.00 | 1 | \$2,237.00 | 0.00% | 0.29% | | | |
| Total Trip Planning: | \$0.00 | 8,948 | \$0.00 | 8.59% | 0.00% | 30.7% | 2747 | \$0.00 |
| Totals: | \$776,601.00 | 104,211 | \$7.45 | | | | | |

Segments not surveyed generally have either a low inquiry rate, or their cost per inquiry was considered too high to warrant comparison with the more typical segments.

Conversion rates for the segments ranged from 21% to almost 31%, with the Trip Planning segment (Rand McNally Atlas) having the best conversion rate of all. The Mass Media segment had the next best rate at 25%, with all the other segments in the 21-24% range.

Because of Mass Media's low cost per inquiry, this segment also had the best cost per visiting party rate at \$6.31 per party. No other segment was lower than \$16 -- more than twice the rate for Mass Media. The Active Mature segment was the next best value with a \$16.35 rate, followed by the Western History & Culture segment at \$27.49. The Outdoor segment was highest at nearly \$60 per visiting party. The Rand McNally segment had no cost per party rate, because Rand McNally does not charge for ads.

Potential visitors may have seen and responded to different media stimuli, such as magazine ads, TV ads, and the Internet. In some cases potential survey respondents sent in more than one reader card from the same magazine (different issues), more than one reader card from different magazines, and sent in a card and called the 800-number as a result of two ads in different magazines.

Average Amount Spent and Conversion Rate Per Visiting Party

Table 2 contains information about the overall conversion rate and cost per visiting party. The totals are weighted averages adjusted according to the weighting strategy discussed on page 15. The total *without* Trip Planning represents the cost per traveling party without the influence of Trip Planning and is presented in **green**. The total *with* Trip Planning shows the average conversion rate as well as the cost per visiting party and is presented in **red**. These two totals are given to show the effect of including Trip Planning on the costs per visiting party. Including Trip Planning when calculating cost per visiting party decreases the average advertising cost per visiting party by \$3.59.

Table 2: Average Cost Per Inquiry and Conversion Rate

| Publication / Segment | Cost | Inquiries | CPI | Conversion Rate | Cost Per Visiting Party |
|--|---------------------|---------------|----------------|-----------------|-------------------------|
| Traditional Audience: | | | | | |
| Segment One – Travel | \$123,209.00 | 9,131 | \$13.37 | 23.0% | \$58.67 |
| Segment Two – Regional | \$25,762.00 | 4,149 | \$6.21 | 19.3% | \$32.17 |
| Segment Three – Home/Living | \$106,105.00 | 14,399 | \$7.37 | 23.1% | \$31.90 |
| Segment Four – Food | \$23,584.00 | 2,659 | \$8.87 | 19.0% | \$46.68 |
| Total Traditional Segment: | \$278,660.00 | 30,338 | \$9.15 | 21.1% | \$41.39 |
| Total Active Mature Segment: | \$45,514.00 | 12,264 | \$3.71 | 22.7% | \$16.35 |
| Total W. Hist./Culture Segment: | \$170,972.00 | 25,178 | \$6.79 | 24.7% | \$27.49 |
| Active Male Segment | \$16,925.00 | 1017 | \$16.64 | 31.8% | \$52.33 |
| Other Enthusiasts Segment | \$92,469.00 | 7069 | \$13.08 | 21.3% | \$61.41 |
| Total Outdoor Segment: | \$109,394.00 | 8,086 | \$13.53 | 22.4% | \$59.81 |
| Total Mass Media: | \$19,800.00 | 12,401 | \$1.60 | 25.3% | \$6.31 |
| Total Trip Planning: | \$0.00 | 8,948 | \$0.00 | 30.7% | \$0.00 |
| Total without Trip Planning | | | | | \$30.24 |
| Total with Trip Planning | | | | 24.10% | \$26.65 |

Conversion Rates Per Publication

Tables 3 and 4 show detailed conversion rates and cost per inquiry for the segments, and for selected magazines. Conversion rates appear only for publications with at least 20 survey responses. In cases where small samples were used, it is more advantageous to review the conversion and cost per inquiry rates for segments and sub-segments rather than the individual magazines.

Table 3: Costs Per Inquiry -- Traditional Segment

| Publication / Segment | Issue(s) | Cost | Phone Inquiries | Reader Card Inq. | TOTAL Inquiries | CPI | Conv. Rate |
|------------------------------------|-------------|----------------------|--------------------|---------------------|--------------------|--------------|---------------|
| Traditional Audience: | | | | | | | |
| Travel Magazines | | | | | | | |
| Amtrak "Empire Builder" | Spring | \$ 3,967.00 | 1 | 0 | 1 | 3967.00 | |
| Conde Nast Traveler | March | 7,456.00 | 268 | 1087 | 1355 | 5.50 | 13.6% |
| Endless Vacation | Mar/Apr | 13,400.00 | 454 | 1578 | 2032 | 6.59 | 28.1% |
| Travel & Leisure | April | 22,360.00 | 310 | 571 | 881 | 25.38 | 20.0% |
| Travel Holiday | March | 28,330.00 | 612 | 1353 | 1965 | 14.42 | 16.7% |
| Vacations | Spring | 4,310.00 | 175 | 746 | 921 | 4.68 | 38.1% |
| — sub total Travel | | 79,823.00 | 1820 | 5335 | 7155 | 11.16 | 24.4% |
| Airline Magazines | | | | | | | |
| NW World Traveler | March | \$ 9,622.00 | 190 | 278 | 468 | 20.56 | |
| Horizon Air | March | 2,250.00 | 11 | 124 | 135 | 16.67 | |
| Spirit | April | 3,329.00 | 11 | 554 | 565 | 5.89 | |
| — sub total Airline | | 15,201.00 | 212 | 956 | 1168 | 13.01 | 22.0% |
| AAA Magazines | | | | | | | |
| Journey (AAA) | May/June | \$ 8,080.00 | 80 | 0 | 80 | 101.00 | |
| Via (formerly AAA Motorland) | Mar/Apr | 11,125.00 | 244 | 24 | 268 | 41.51 | |
| Rocky Mtn Motorist (AAA) | April | 7,820.00 | 408 | 52 | 460 | 17.00 | |
| — sub total AAA | | 27,025.00 | 732 | 76 | 808 | 33.45 | 13.3% |
| Total Travel Magazines | | \$ 122,049.00 | 2764 | 6367 | 9131 | 13.37 | 23.0% |
| Regional Magazines | | | | | | | |
| Atlantic Monthly | March | \$ 3,470.00 | 87 | 1419 | 1506 | 2.30 | 20.9% |
| Minnesota Monthly | April | 2,850.00 | 14 | 582 | 596 | 4.78 | 28.6% |
| Alaska | Feb | 3,550.00 | 174 | 677 | 851 | 4.17 | 18.6% |
| Natural History | April & May | 15,892.00 | 265 | 931 | 1196 | 13.29 | 12.7% |
| Total Regional Magazines | | \$ 25,762.00 | 540 | 3609 | 4149 | 6.21 | 19.3% |
| Home/Living Magazines | | | | | | | |
| Country Home | Mar/April | \$ 24,143.00 | 368 | 1500 | 1868 | 12.92 | 15.4% |
| Country Living | April | 11,180.00 | 497 | 714 | 1211 | 9.23 | 25.0% |
| Family Fun | April | 6,110.00 | 452 | 1001 | 1453 | 4.21 | 29.0% |
| Ladies Home Journal | March | 44,488.00 | 222 | 2713 | 2935 | 15.16 | 29.5% |
| Martha Stewart Living | April | 6,600.00 | 212 | 1219 | 1431 | 4.61 | 0.0% |
| Parents | April | 8,960.00 | 192 | 2361 | 2553 | 3.51 | 10.5% |
| Sunset | April | 4,624.00 | 294 | 2654 | 2948 | 1.57 | 31.0% |
| Total Home/Living Magazines | | \$ 106,105.00 | 2237 | 12162 | 14399 | 7.37 | 23.1% |
| Food Magazines | | | | | | | |
| Food & Wine | March | 16,401.00 | 231 | 1590 | 1821 | 9.01 | 19.0% |
| Gourmet | March | 5,283.00 | 85 | 719 | 804 | 6.57 | 21.4% |
| Saveur | April | 1,900.00 | 34 | 0 | 34 | 55.88 | 0.0% |
| Total Food Magazines | | \$ 23,584.00 | 350 | 2309 | 2659 | 8.87 | 19.0% |
| Total Traditional Segment: | | \$ 277,500.00 | 5891 | 24447 | 30338 | 9.15 | 21.1% |

Note: Inquiries through August 31, 1998 were included in the survey.

Table 4: Costs Per Inquiry -- All Other Segments

| Publication / Segment | Issue(s) | Cost | Phone Inquiries | Reader Card Inq. | TOTAL Inquiries | CPI | Conv. Rate |
|--|--------------|----------------------|--------------------|---------------------|--------------------|--------------|---------------|
| Active Mature Segment: | | | | | | | |
| Mature Outlook | Mar/Apr | \$ 10,335.00 | 115 | 2301 | 2416 | 4.28 | 28.6% |
| New Choices | March | 12,474.00 | 93 | 636 | 729 | 17.11 | 0.0% |
| Travel 50 | Spring | 2,205.00 | 105 | 429 | 534 | 4.13 | 47.6% |
| Travel America | three issues | 11,025.00 | 1008 | 6889 | 7897 | 1.40 | 20.6% |
| Yankee | April | 7,745.00 | 216 | 356 | 572 | 13.54 | |
| Wild Bird | April | 1,730.00 | 32 | 84 | 116 | 14.91 | |
| Total Active Mature Segment: | | \$ 45,514.00 | 1569 | 10695 | 12264 | 3.71 | 22.7% |
| Western History & Culture Segment: | | | | | | | |
| American Heritage | two issues | 27,590.00 | 593 | 4387 | 4980 | 5.54 | 22.2% |
| Country America | Feb/Mar | 28,140.00 | 312 | 5624 | 5936 | 4.74 | 25.9% |
| Historic Traveler | March & May | 7,557.00 | 215 | 1394 | 1609 | 4.70 | 44.8% |
| Home & Away (AAA) | Mar/Apr | 42,580.00 | 992 | 1973 | 2965 | 14.36 | 19.0% |
| National Geographic Traveler | two issues | 57,400.00 | 1760 | 5415 | 7175 | 8.00 | 22.9% |
| Preservation | Mar/Apr | 7,705.00 | 189 | 2324 | 2513 | 3.07 | |
| Total W. History & Culture Segment: | | \$ 170,972.00 | 4061 | 21117 | 25178 | 6.79 | 24.7% |
| Outdoor Enthusiasts Segment: | | | | | | | |
| Active Male Magazines | | | | | | | |
| Adventure Journal | April | \$ 7,000.00 | 115 | 158 | 273 | 25.64 | |
| Men's Journal | April | 695.00 | 60 | 550 | 610 | 1.14 | |
| Outdoor Life | April | 8,380.00 | 114 | 0 | 114 | 73.51 | |
| Western Outdoors | April | 850.00 | 8 | 12 | 20 | 42.50 | |
| -- sub total Active Male | | \$ 16,925.00 | 297 | 720 | 1017 | 16.64 | 31.8% |
| Other Enthusiasts Magazines | | | | | | | |
| Backpacker | Mar & Apr | \$ 24,810.00 | 485 | 2323 | 2808 | 8.84 | 18.0% |
| Sierra | Mar/Apr | 16,070.00 | 411 | 949 | 1360 | 11.82 | 22.2% |
| Snow Country | Spring | 6,650.00 | 105 | 285 | 390 | 17.05 | |
| Outside | Mar & Apr | 44,939.00 | 581 | 1930 | 2511 | 17.90 | 27.9% |
| -- sub total Other Enthusiasts | | \$ 92,469.00 | 1582 | 5487 | 7069 | 13.08 | 21.3% |
| Total Outdoor Segment: | | \$ 109,394.00 | 1879 | 6207 | 8086 | 13.53 | 22.4% |
| Mass Media Publications | | | | | | | |
| Midwest Vacation Guide | Spring-Mar. | \$ 6,500.00 | 2346 | 6108 | 8454 | 0.77 | 24.7% |
| Life | April | 13,300.00 | 364 | 3583 | 3947 | 3.37 | 27.5% |
| Total Mass Media: | | \$ 19,800.00 | 2710 | 9691 | 12401 | 1.60 | 25.3% |
| Trip Planning: | | | | | | | |
| Rand McNally Atlas | | \$ - | 8948 | 0 | 8948 | 0.00 | 30.7% |
| Total Trip Planning: | | \$ - | 8948 | 0 | 8948 | 0.00 | 30.7% |
| Total 1998 Magazine: | | \$ 623,180.00 | 25,058 | 72,157 | 97,215 | 6.41 | |

Note: on Tables 3 and 4, only those publications with 20 or more survey responses show a conversion rate. Inquiries through August 31, 1998 were included in the survey.

Most of the individual publications had conversion rates similar to the overall, although there were a few stars and a couple of underachievers. Several of the Active Mature magazines did well with the exception of New Choices, which had no travel conversions. The same was true of Home/Living magazines -- some did well, and others were low-to-non-performers.

Table 5 shows estimated values for cost per visitor and return over cost by the major segments. Again, we see that the Mass Media segment provided both the lowest cost per visiting party and best return per dollar (over the costs of the media).

Table 5: Costs and Return Per Visiting Party

| Publication / Segment | Estimated Visiting Parties | Cost Per Visiting Party | Average Overnights Per VP | Ave Amt Spent Per Night | Ave Amt Spent Per VP | Estimated Total Return | Rate of Return Over Ad Costs |
|--|----------------------------|-------------------------|---------------------------|-------------------------|----------------------|------------------------|------------------------------|
| Traditional Audience: | | | | | | | |
| Segment One - Travel | 2100 | \$58.67 | 5.24 | \$131.30 | \$688.01 | \$1,444,914.64 | 1172.73% |
| Segment Two - Regional | 801 | \$32.17 | 5.22 | \$140.50 | \$733.41 | \$587,283.19 | 2279.65% |
| Segment Three -- Home/Living | 3326 | \$31.90 | 5.07 | \$161.78 | \$820.22 | \$2,728,205.64 | 2571.23% |
| Segment Four -- Food | 505 | \$46.68 | 6.69 | \$157.06 | \$1,050.73 | \$530,840.01 | 2250.85% |
| Total Traditional Segment: | 6732 | \$41.39 | 5.74 | \$148.51 | \$852.45 | \$5,738,902.65 | 2059.46% |
| Total Active Mature Segment: | 2784 | \$16.35 | 5.03 | \$129.24 | \$650.08 | \$1,809,768.12 | 3976.29% |
| Total W. Hist./Culture Segment: | 6219 | \$27.49 | 5.21 | \$148.31 | \$772.70 | \$4,805,364.56 | 2810.61% |
| Active Male Segment | 323 | \$52.33 | 6.29 | \$92.00 | \$578.68 | \$187,148.58 | 1105.75% |
| Other Enthusiasts Segment | 1506 | \$61.41 | 6.54 | \$144.57 | \$945.49 | \$1,423,618.14 | 1539.56% |
| Total Outdoor Segment: | 1829 | \$59.81 | 6.50 | \$138.00 | \$897.00 | \$1,640,705.39 | 1499.81% |
| Total Mass Media: | 3137 | \$6.31 | 5.39 | \$116.30 | \$626.86 | \$1,966,734.38 | 9933.00% |
| Total Trip Planning: | 2747 | \$0.00 | 6.90 | \$151.33 | \$1,044.18 | \$2,868,391.81 | ----- |

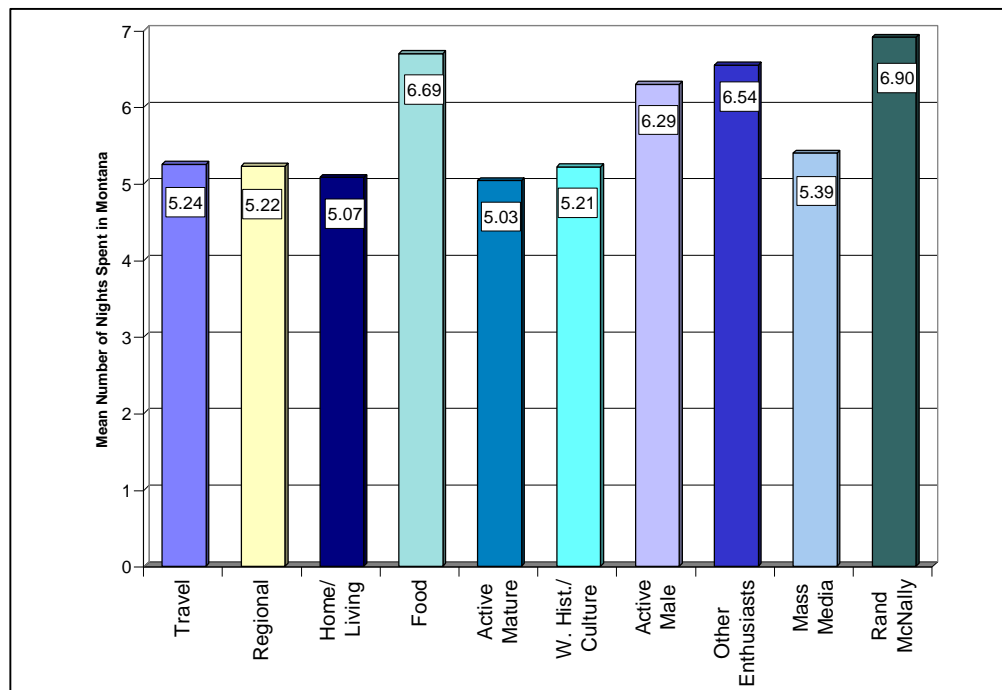
NOTE: The average amount spent per visiting party is calculated by multiplying the mean amount spent per day times the mean overnights per trip.

The Mass Media ads provided the best return because of their low cost per visiting party. This, despite having one of the lowest averages for "amount spent per party." Again, the Trip Planning segment (Rand McNally) has no return over costs, because its ads were cost-free. However, this segment had the second highest "amount spent per party." Lowest rates of return were in the Active Male segment and the Travel sub-segment of the Traditional Audience segment.

Average Overnight and Amount Spent Per Visiting Party for Each Segment

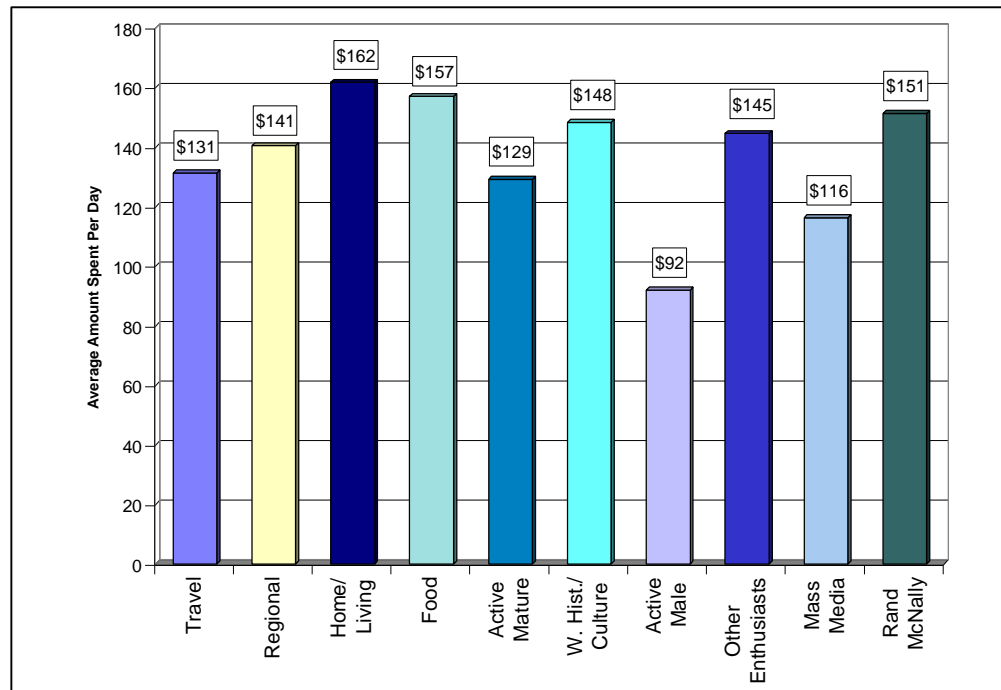
This section reports on how many nights, on average, each visiting party spent while traveling in Montana. It also contains information about the amount of money spent per day, not including costs of traveling to Montana such as airfare or gas for vehicle. These results are presented for each magazine segment in Figures 1 and 2 and allow for easy comparison of each segment.

Figure 1: Average Overnights Per Visiting Party



Rand McNally, Food, Active Male, and Other Enthusiast Segments spent the most nights, on average, while traveling in Montana.

Figure 2: Average Amount Spent Per Day Per Visiting Party



Active Male and Mass Media inquiries spent the least amount of money per day while traveling in Montana.

Sample Weighting for Demographic and Traveler Profiles

The first section of this report addressed how effective the various segments were at converting travelers. In the following section we combine responses across all segments in order to profile travelers versus non-travelers.

In order to make accurate statements about travelers and non-travelers it was necessary to weight the answers of respondents from some segments more than others. This was necessary because we over-sampled respondents from some segments and under-sampled from other segments compared to their actual numbers among those making travel information inquiries. For example, Food and Wine members comprised about 1.9% of the total inquiries but 9.5% of our respondents. By comparison, the Regional Segment produced about 15% of the inquiries whereas they represented only 9.5% of the total survey respondents. Consequently our mathematical adjustment gave relatively less weight to respondents from Food and Wine that was overrepresented and greater weight to other segments that were underrepresented.

Adjustments of this nature are an acceptable industry standard and are used frequently to make inferences about a population that has been sampled to over- or under-represent some of its subgroups.

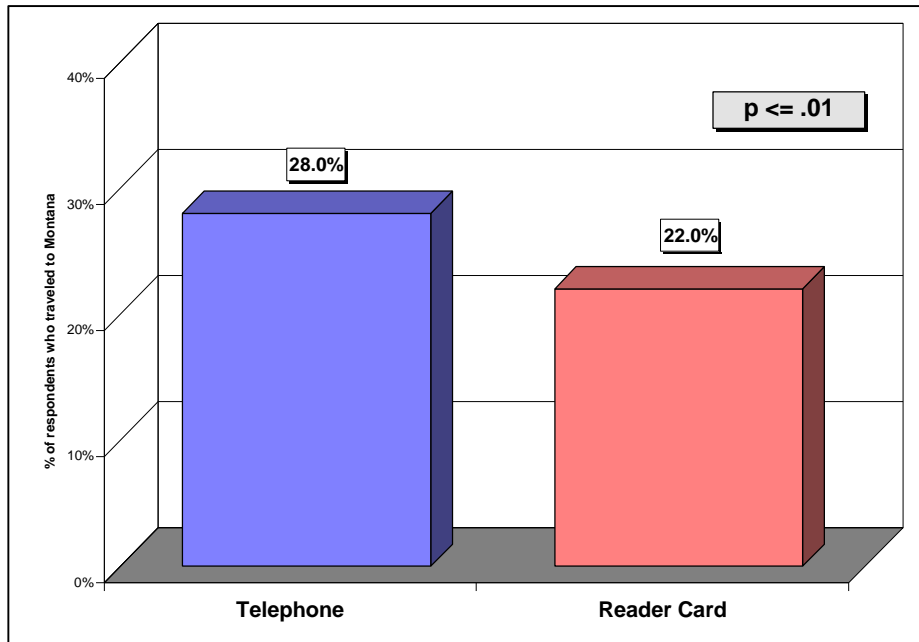
Don't Know/Refused Result in Different "Ns" for Different Questions

Respondents always have the option of refusing to answer questions in the survey. They may feel uncomfortable revealing certain information such as income, or they may not remember specific details. All responses that represent a "don't know/refused" are omitted from the analysis of that particular question. As a result, the number of responses for each question will vary. All "don't know/refused" responses were treated as missing values and were not presented in any of the figures.

Telephone Better at Generating Travel

In this section we look at how methods of obtaining information affected the decision to travel to Montana.

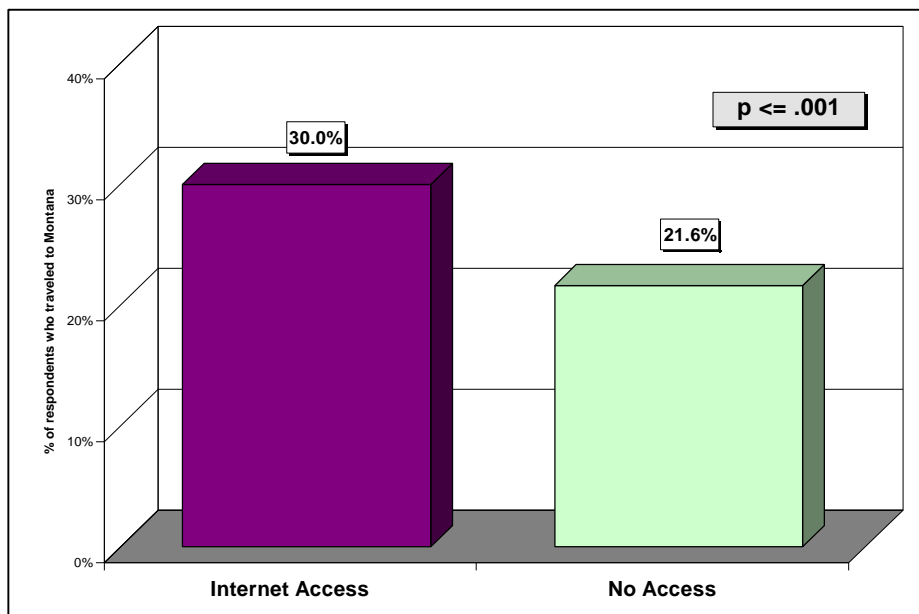
Figure 3: Comparison -- Telephone Requests vs. Reader Cards



Respondents who called the 800-number had a higher conversion rate than those who requested information via the reader card.

This could be expected, because telephone calls involve a more dynamic activity versus the passive act of mailing a reader cards.

Figure 4: Comparison -- Internet Access vs. No Access (Q39)



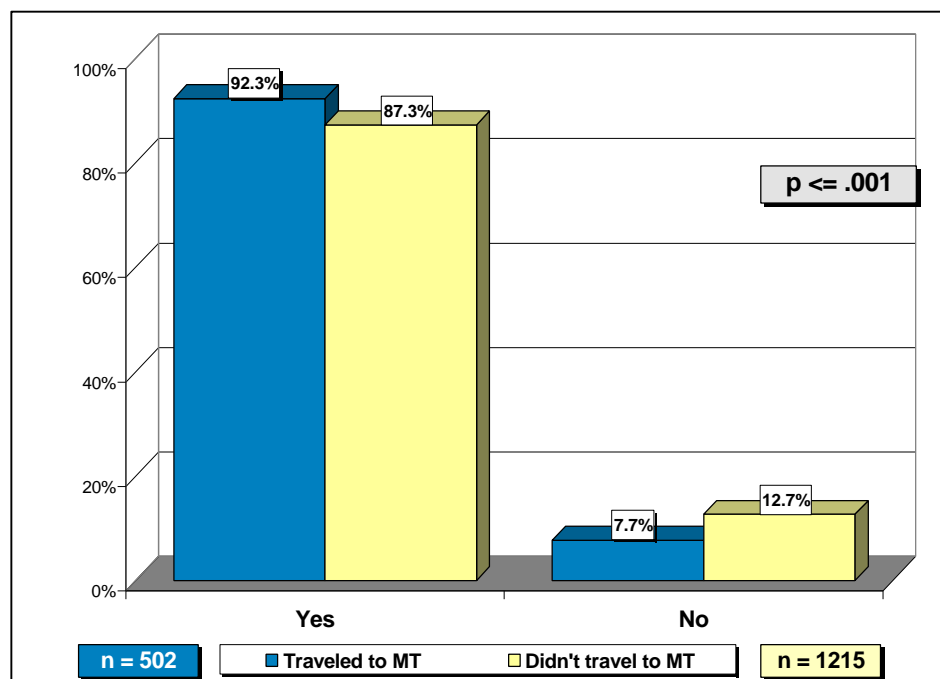
Taking this one step further, we find that those respondents who said they use the Internet to access travel information had a higher conversion rate than those who do not use the Internet for travel planning. Again, the active use of the Internet signals high prior commitment.

Montana Travel Information and Its Effect

Travelers Get the Info and Are More Likely to Remember They Got It

This section reports whether respondents remembered receiving the information they requested. The number of respondents is reported by those traveling versus not traveling.¹

Figure 5: Did You Receive the Information You Requested? (Q3)



Overall, about 90% of respondents who traveled to Montana in the past 12 months remembered they received the information they requested.

Travelers to Montana were more likely to say they received the information than those who did not travel to Montana.

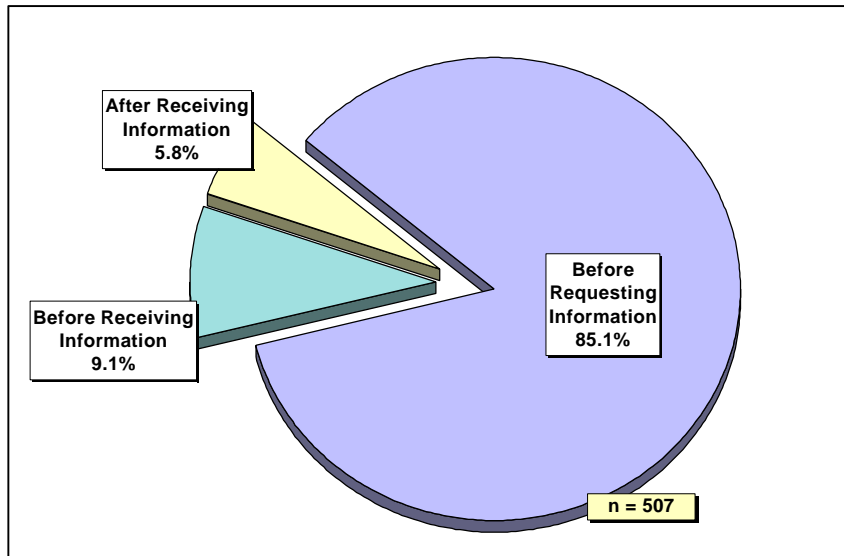
We also found that those who requested information by phone remembered receiving the information at a slightly higher rate than those who sent in a reader card, though the difference is not significant. The explanation for any difference may be that information **might be** received, but not be memorable to those not traveling to Montana.

¹ The statistical weighting resulted in a slightly higher number of estimated travelers (n = 507) than actually reported traveling (n = 485) because those from segments who traveled most were underrepresented with the sampling procedure, which was then corrected by post-stratification weighting.

The Decision To Travel Made Before The Request; The Information Has Little Effect On Length Of Stay

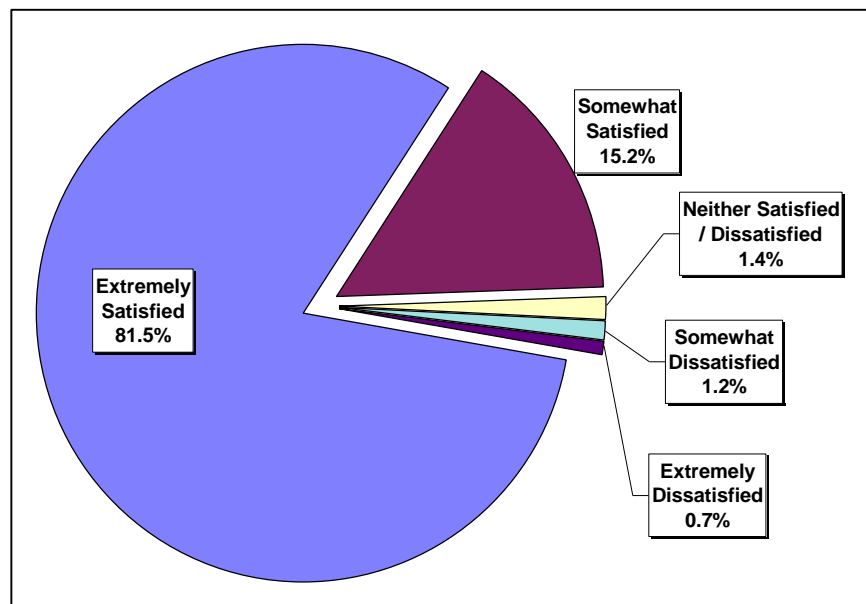
In this section we examine the decision-making process of respondents who visited Montana, and the impact of the information on their travel.

Figure 6: Did You Decide to Travel to Montana Before or After You Requested/Received the Information? (Q7, Q8)



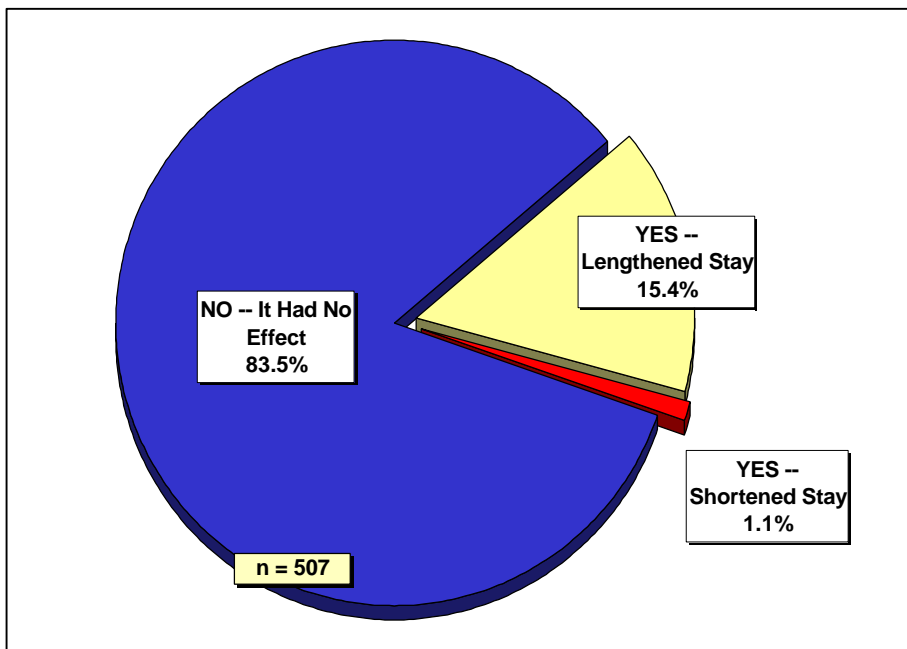
*The majority of travelers had made the decision to come to Montana **before** requesting travel information; slightly less than 6% decided to travel to Montana after they received the information.*

Figure 7: Overall, How Satisfied or Dissatisfied Were you with the Montana Travel Information You Received? (Q9)



Most of those receiving the information said they were extremely satisfied; less than 2% registered any dissatisfaction with the information they received.

Figure 8: Did the Information You Received Influence the Planning of the Length of Your Stay for Your Vacation in Montana? (Q10)



Most travelers reported that the information they received had no effect on the length of their stay.

*About 15% of travelers said their vacation stay was **extended** because of the travel information they received.*

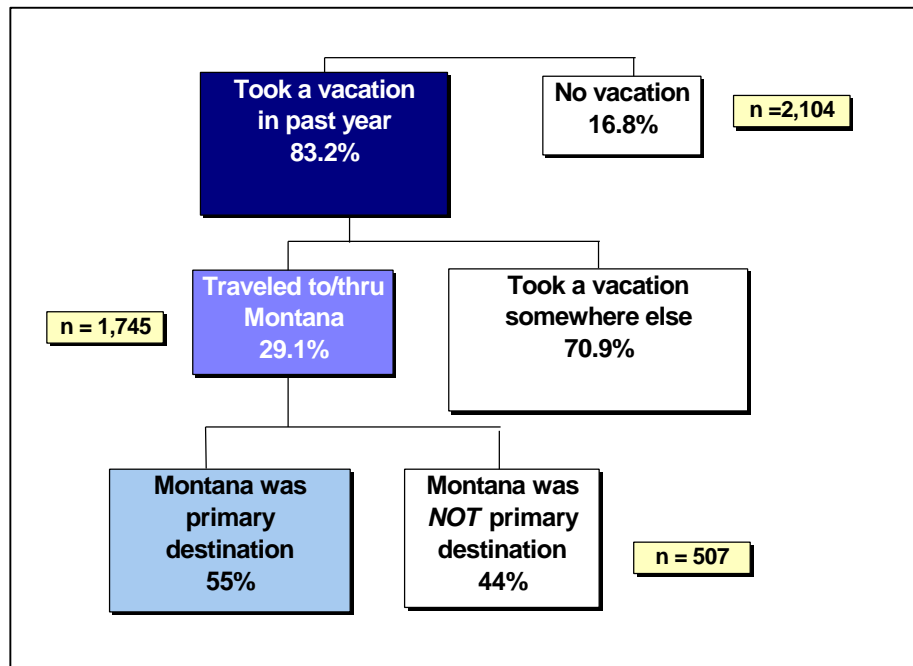
In summary, the decision to travel to Montana was usually made **before** the request for information. However, about 15% indicated that the information extended their stay. Those who traveled to Montana had a slightly higher rate of remembering that they received the information, so the information may be viewed as **reinforcing** their decision to travel to Montana. In addition, most were very satisfied with the information they received, and some said their stay was **extended** because of the information received.

Montana Traveler Demographics

One-Quarter of Those Who Took a Vacation Came to Montana; Sightseeing Was The Reason

This section reports on respondents who said they traveled to or through Montana, whether Montana was their primary destination, and the purpose of their trip.

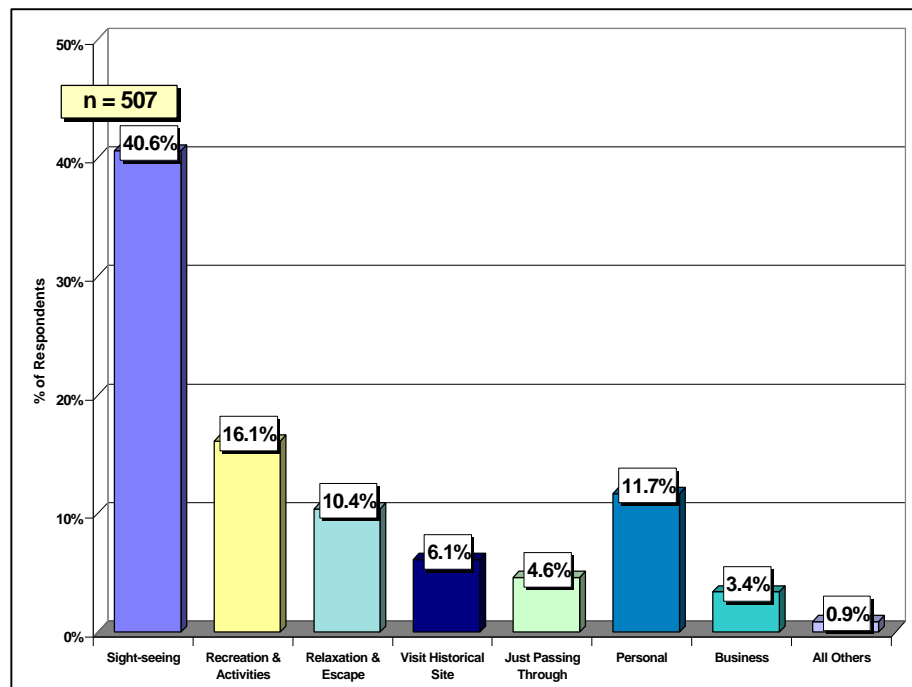
Figure 9: Did You Take a Vacation? In Montana? Was Montana Your Primary Destination? (Q4-Q6)



The majority of the respondents took a vacation in the past year; of those who did, slightly more than one-quarter included Montana in their travel plans.

*Of the 507 respondents who did travel to Montana, more than half said that Montana was their **primary** destination.*

Figure 10: What was the Primary Purpose of This Trip? (Q20)



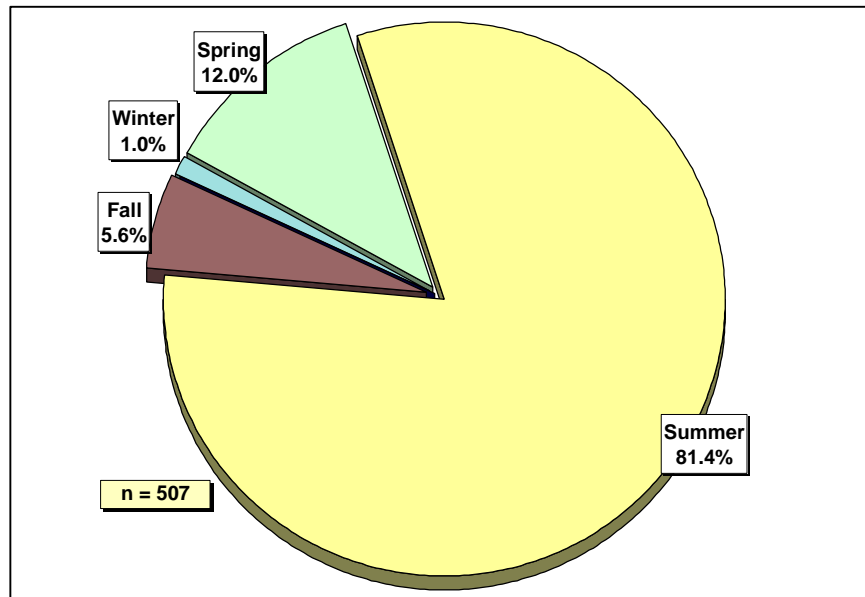
Of those who visited Montana, Sightseeing was the most-often mentioned purpose of travel, representing more than one-third of all mentions.

Recreation and Activities, Personal, Relaxation and Escape, and Visiting Historic Sites were mentioned next most often.

Summer Was the Most Popular Season; Most Traveled by Car

This section reports on when travelers visited Montana and how they got there.

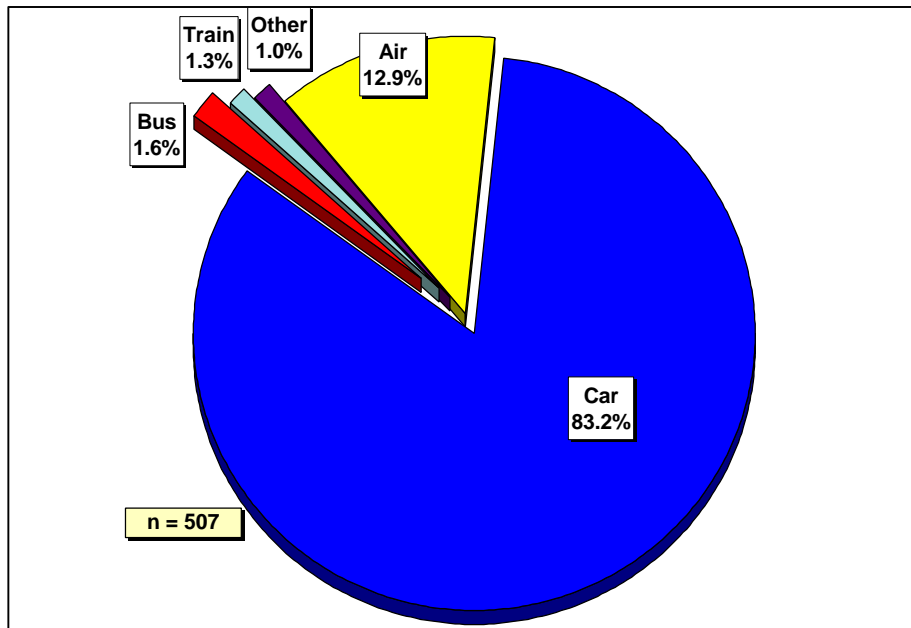
Figure 11: In Which Season Did You Visit? (Q21)



About four-out-of-five of those who visited Montana said their most recent trip was in the Summer; Spring accounted for 12% of all visits.

This would be expected since the campaign was geared towards bringing warm season travelers to Montana.

Figure 12: Form of Transportation Used to Visit Montana (Q22)



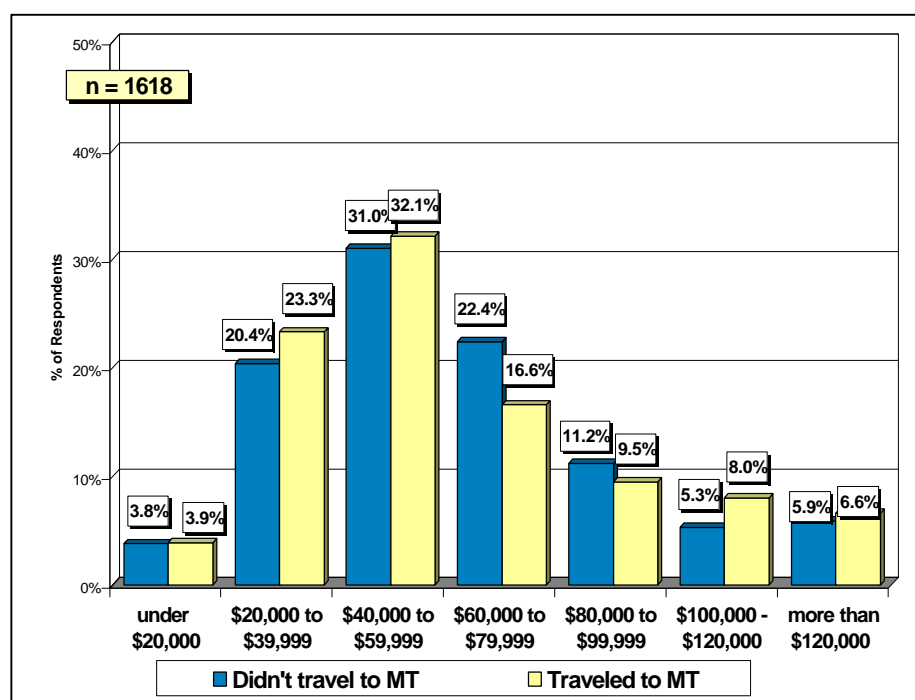
Most travelers came by Car or RV, with almost 13% saying that they came to Montana by air.

Travelers Were About 54 Years Old, with Income of \$40,000 - \$59,000

The mean age of all travelers to Montana was 53.8, which was significantly different from the mean age of those who did not travel to Montana (51.5). Both travelers and non-travelers were equally likely **not** to have children living at home (more than 70%), and to be moderately well-educated. Females were 55% of the respondents to the survey, and the 55%:45% female:male ratio was the same for both travelers and non-travelers.

Annual Household Income was the last question asked primarily because so many respondents dislike answering. Of the 2,106 respondents in this study, only about 77% answered the income question.

Figure 13: Total Annual Household Income (Q54)

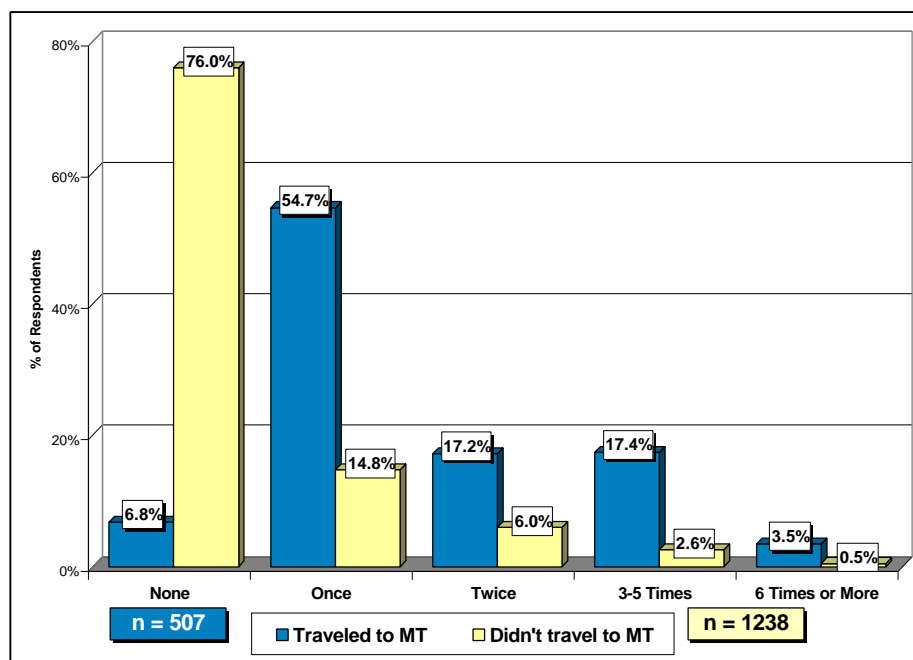


One-third of travelers said their total household income was in the \$40,000-\$59,999 range; another 20% each were in the \$20,000-\$39,999 and \$60,000-\$79,999 ranges.

Been There, Done That – And Came Back

This section reports on respondents' previous travel history and its relation to traveling to Montana this year. The mean number of times Montana travelers reported visiting Montana in the last five years was 2.1.

Figure 14: Average Number of Times Respondent Has Been to Montana in the Last 5 Years (Q35)



*Many travelers to Montana indicated that their visit was a **return** visit.*

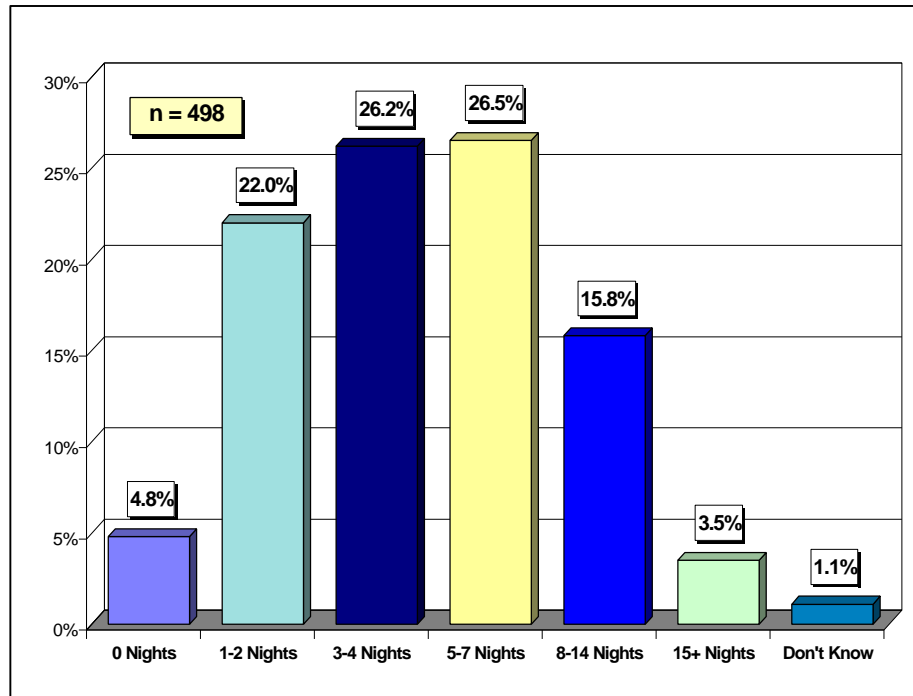
Over three-quarters of those who did not travel to Montana said they had never been there; about 37% of those who traveled to Montana said they had been there at least twice.

Traveler Economics

In this section we look at the overnight accommodation patterns and economic impact of Montana visitors.

Travelers Stay Five Nights or More

Figure 15: How Many Nights Did You Stay in Montana? (Q25)



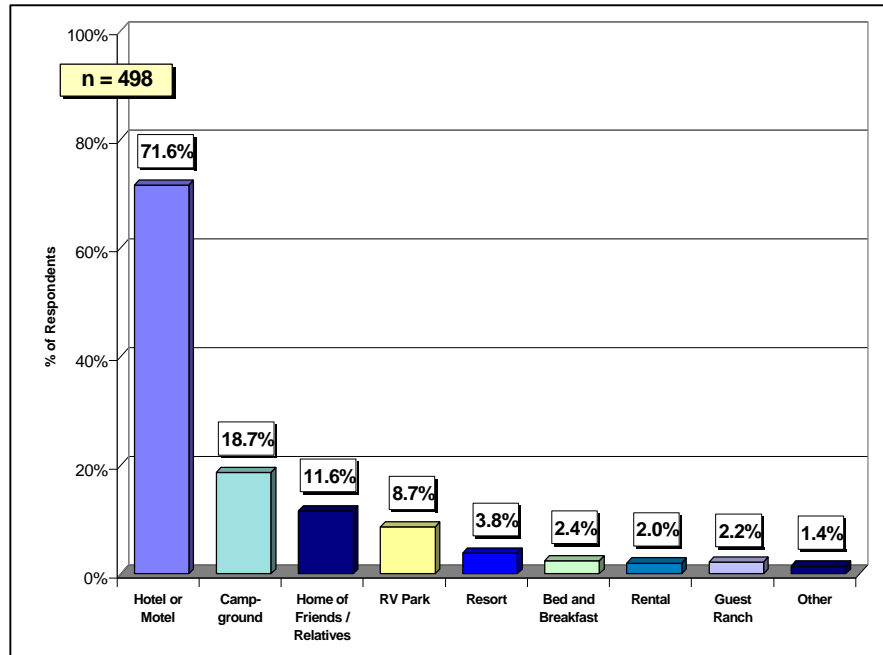
The average length of stay per visit was between five and six overnights (5.5).

Roughly one-quarter of travelers stayed 5-7 nights; another quarter stayed 3-4 nights.

About 15% said they stayed longer than one week.

Travelers Stay in Motels and Campgrounds

Figure 16: What Accommodations Did You Use During Your Stay? (Q26)



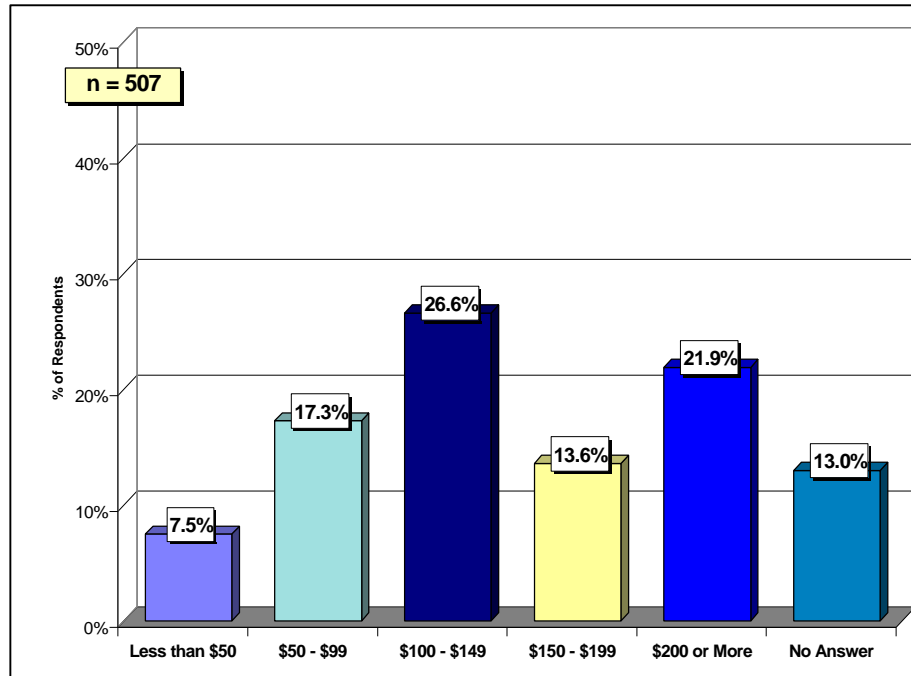
Hotels or Motels were the choice of the majority of travelers; campgrounds were next-most mentioned.

About 12% said they stayed with friends or relatives.

(Note: The percentages may sum to greater than 100% because each respondent could give more than one answer.)

Visitors Spend \$143 Per Day Per Party

Figure 17: How Much Did Your Party Spend Per Day? (Q27)



The average amount spent per party per day was slightly higher than \$143.

These figures include all expenses except travel-related expenses such as airline fares and gas.

By multiplying the amount spent per day by the number of overnights (5.6), the estimated average amount spent per visit was about \$791 per party.

Demographic and Economic Profile of the Typical Traveler

The following is a “majority profile” of summertime travelers to Montana who requested travel information before coming:

- Travelers came to Montana as their primary destination.
- Most drove their own car.
- The majority were here for sightseeing.
- The average stay included almost six overnights, usually at a hotel.
- Travelers spent an average amount of about \$143 per day.
- The average traveler was in their mid-50’s and had no children at home.
- They had considerable income.
- Most had been to Montana previously.

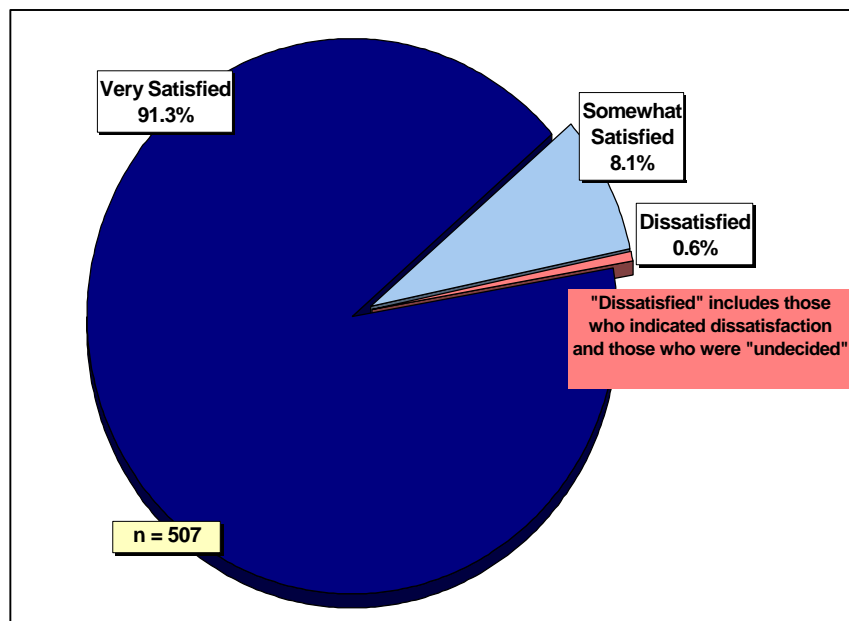
Not all travelers fit this description, but most conformed to one or more of these categories.

Future Travel Indicators

This section reports on the satisfaction of travelers to Montana, their likelihood of returning, and their interest in a Lewis-and-Clark Trail vacation.

Montana Travelers Satisfied; Most Would Return

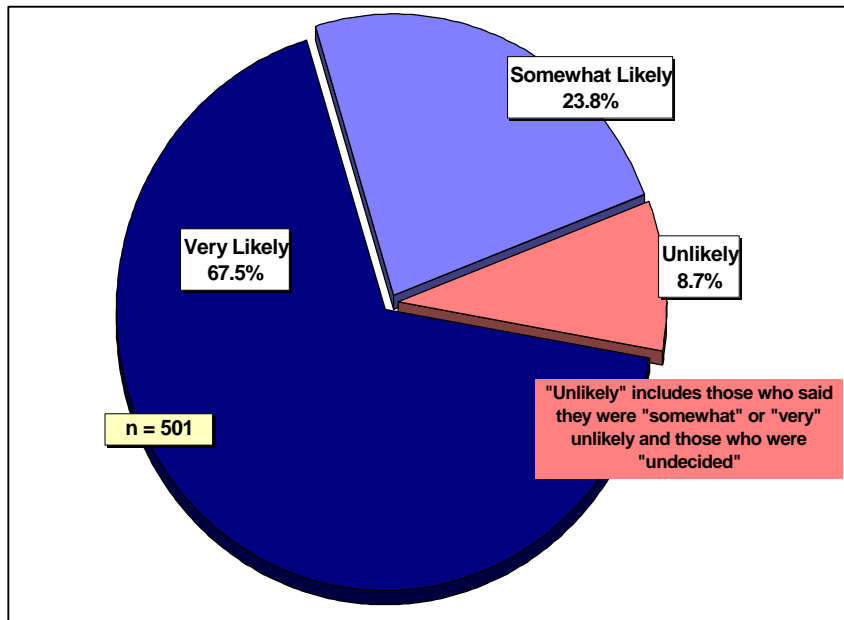
Figure 18: How Satisfied Were You With Your Trip? (Q28)



The vast majority of respondents were very satisfied with their visit.

*Slightly less than one percent indicated **any** dissatisfaction or non-satisfaction with their visit.*

Figure 19: Likelihood of Another Trip to Montana (Q29)



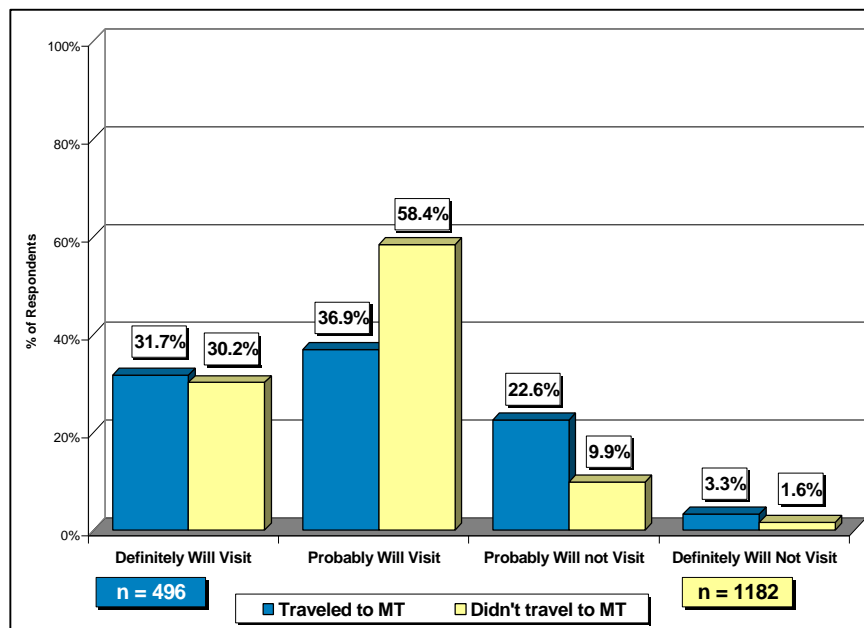
Almost 70% said it was very likely that they would take another trip; just 8% thought it unlikely that they would return.

It appears that those who had traveled to Montana were satisfied and **proved** it by returning for another visit, because many indicated this was not their first time to Montana.

Visiting Montana – If Not Now, Soon

All respondents were asked if they planned to visit Montana in the next two years. A full 90% of non-Montana visitors and 68% of Montana visitors reported they intended to visit Montana in the next two years. People who did not travel to Montana this year were more likely to report that they planned to visit in the next two years than those who did visit this year.

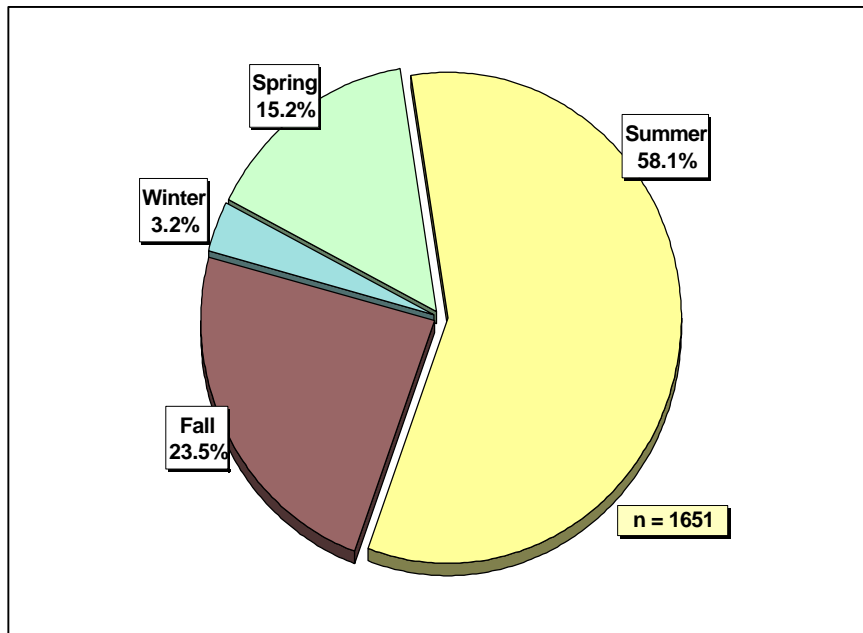
Figure 20: In the Next Two Years Would You Say You... (Q33)



When asked if they would visit Montana in the next two years, 68% of visitors and almost 90% of non-visitors said they intend to visit.

*Those who did not travel to Montana this year were **more** likely to say they plan to visit in the next two years than those who did visit this year.*

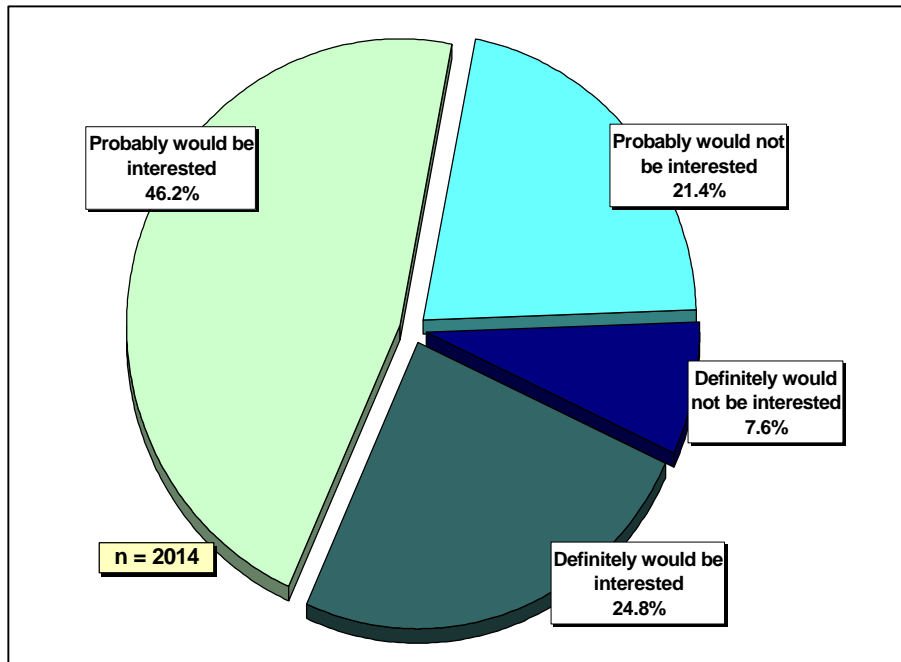
Figure 21: In Which Season Would You Return to Montana? (Q34)



Summer was the most popular time for future travel, mentioned by more than half of both travelers and non-travelers.

Fall also received several mentions and some respondents reported they ordered information for a Fall trip this year.

Figure 22: Interest in a Vacation Following the Lewis & Clark Trail (Q37)



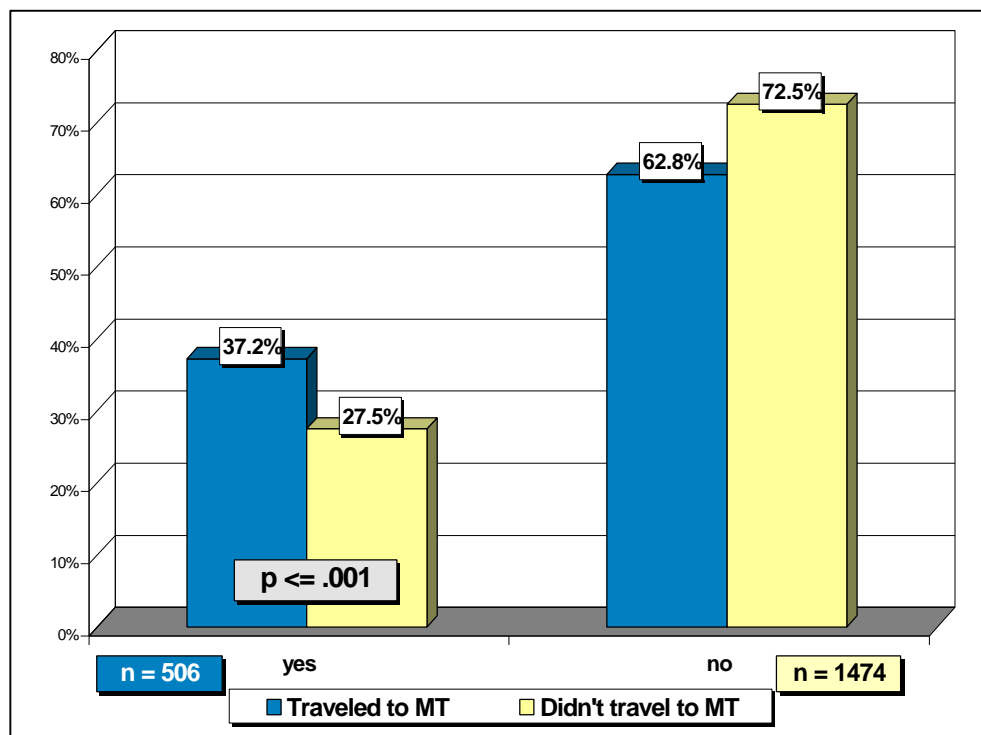
Almost 68% of all respondents said they would be somewhat or very interested in a vacation that followed the Lewis & Clark Trail.

Use of the Internet

This section reports on respondents' use of the Internet and the Internet's impact on travel planning.

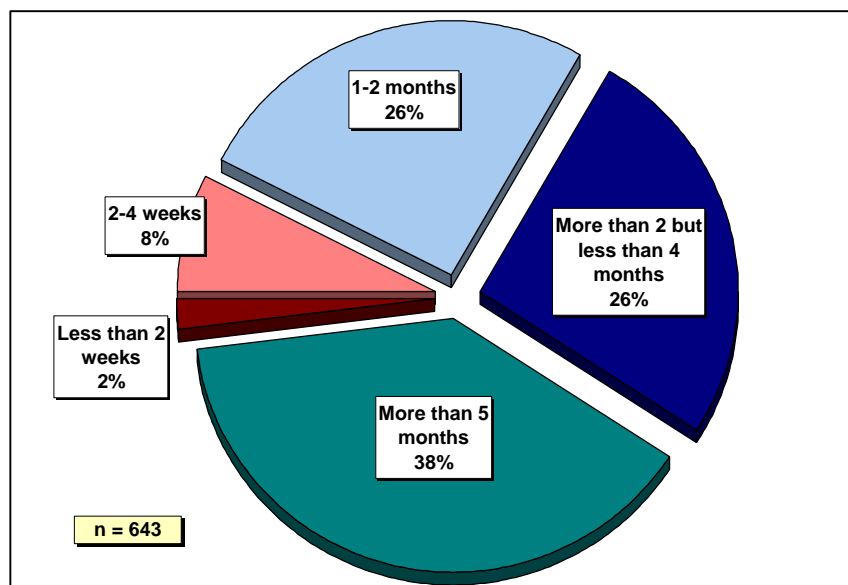
Travelers More Likely to Log On; Return to Web Sites Often

Figure 23: Do You Use the Internet to Access Travel Information or When Making Travel Plans? (Q39)



Those who traveled to Montana were more likely to use the Internet to access travel information or make travel plans; almost 38% indicated Internet access compared to 28% of non-travelers.

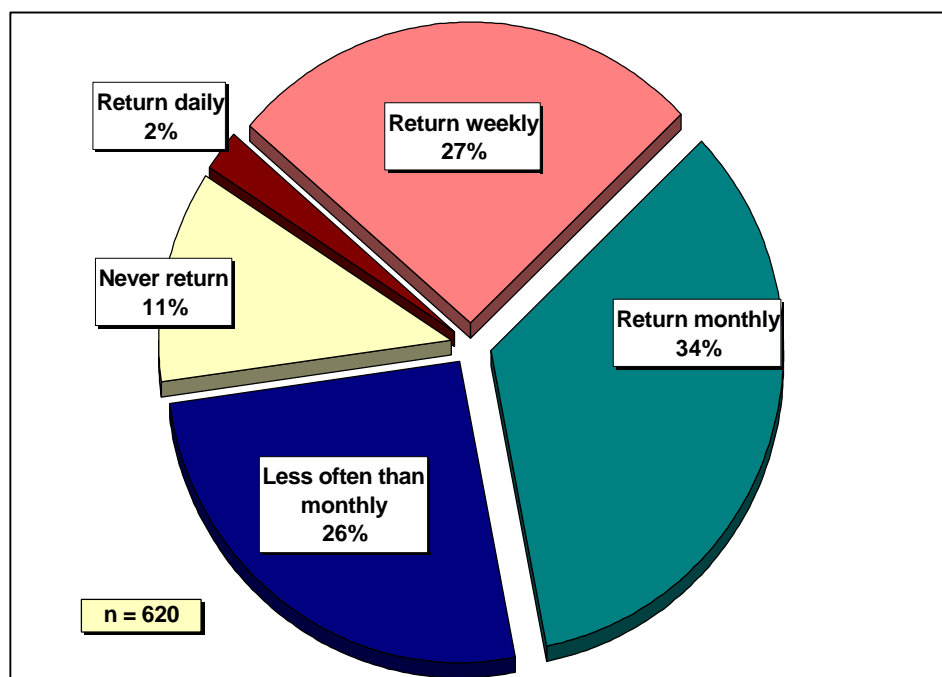
Figure 24: In Using The Internet, At What Point Do You Start Searching For Information? (Q40)



Almost 40% of those who used the Internet to access travel information said they started their search at least five months ahead of when they planned to travel; another one-quarter planned 2-4 months ahead.

Just 10% started their Web search one month or less before traveling.

Figure 25: How Often Do You Return To the Same Web Site to Check for Updated Information? (Q41)



Thirty-four percent of those who used the Internet to access travel information said they returned to sites on a monthly basis; another one-quarter checked back at least once per week.

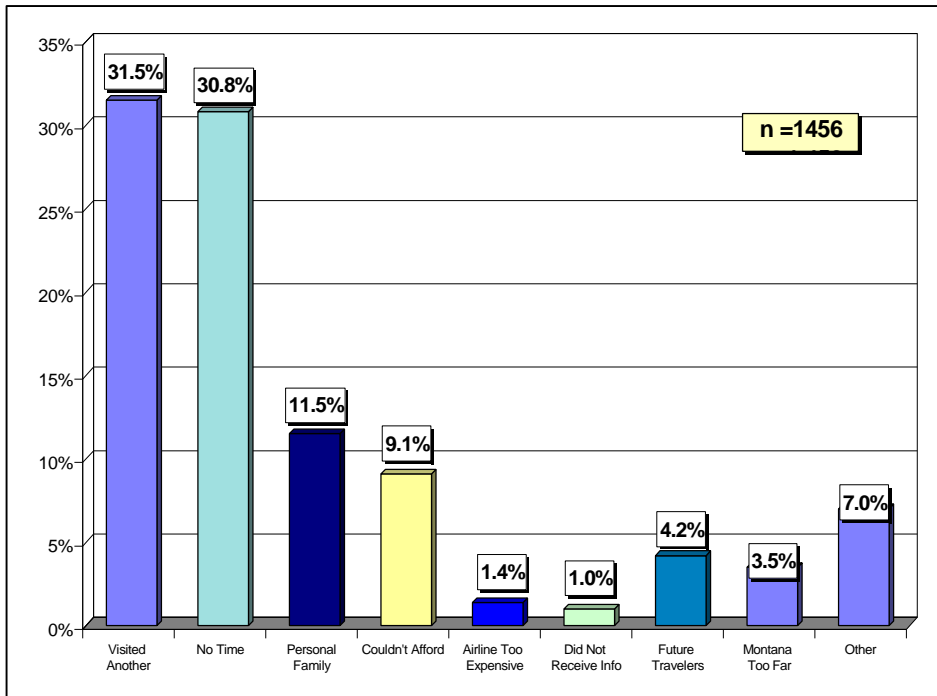
Only about 11% said they never went back to a Web site once visited.

Non-Travelers Profile

In this section we examined the reasons given for not traveling to Montana.

Those Who Did Travel Went Elsewhere; Others Had No Time for a Trip

Figure 26: Reasons for Not Visiting Montana Last Year (multiple response) (Q32)



About one-third of those who did not visit Montana said they went somewhere else; another 31% said they had no time for a trip.

Very few (1%) of all respondents gave "I Did Not Receive the Travel Information" as one of their reasons for not visiting.

CONCLUSIONS

Conversion rates were good, and generally consistent across the publications. The Mass Media segment had one of the best conversion rates, the lowest cost per inquiry, and the best return over costs. The Trip Planning segment (Rand McNally Atlas) had the best conversion rate of all the segments.

Because of the similarity in conversion rates, it would seem that the rate of inquiry is a good measurement of eventual travel intention. These publications that generate inquiries about Montana can be expected to generate travel as well. There were several publications that were also part of the Warm Season Campaign that were not measured in this study. In every case, these magazines had low inquiry rates and subsequent high costs per inquiry.

People who requested information via telephone were more likely to travel to Montana than those who sent in reader cards. Also, those who accessed the Internet for travel planning were more likely to travel to Montana. It would appear that involvement in the process is related to the end result -- the more "active" potential travelers are with the planning process, the more likely they are to actually travel to Montana. Therefore, it would be beneficial to insure that those who are actively obtaining travel information are provided with everything they might need or request. Internet information must be seen as valuable and timely; responses to telephone inquiries must be met with swift delivery of the specific Montana travel information desired.

APPENDICES

APPENDIX A – OPEN-ENDED ANSWERS FROM THE SURVEY

Table 6: Open-ended answers by question

| Respondent # | Question # | Response to "Other" Option |
|--------------|------------|---|
| 42 | Q20 | Train |
| 3690 | Q20 | Child had summer camp. |
| 4002 | Q20 | Because Of The Kids. |
| 4678 | Q22 | Bicycle |
| 442 | Q32 | Weather |
| 483 | Q32 | Didn't get that far, their mobile home broke down |
| 490 | Q32 | Car broke down in Wyoming. |
| 507 | Q32 | Didn't have a companion to go with him. |
| 586 | Q32 | Bicycle |
| 656 | Q32 | Handicapped, unable to travel. Travels by book only. |
| 669 | Q32 | Didn't discuss it until recently. |
| 707 | Q32 | Variety of reasons. |
| 800 | Q32 | Went hunting-was planned. |
| 909 | Q32 | No travel companion. |
| 935 | Q32 | It was too hot for travel. |
| 1274 | Q32 | No travel companion. |
| 1334 | Q32 | Van broke down before we got there. |
| 1379 | Q32 | Wanted to visit someplace warm. |
| 1462 | Q32 | Already there 2 years ago. |
| 1493 | Q32 | No pleasure trips were taken at all. |
| 1558 | Q32 | Been to local places. |
| 2756 | Q32 | Chose not to go. |
| 3116 | Q32 | Have not had the opportunity to travel in this direction. |
| 3213 | Q32 | Too hot this summer. |
| 3466 | Q32 | No good hunting. |
| 3615 | Q32 | Business |
| 3728 | Q32 | Already been there a few times. |
| 3812 | Q32 | Not Planned |
| 4178 | Q32 | Didn't want to. |
| 4295 | Q32 | Out of college. |
| 4602 | Q32 | Weather in that time of year. |
| 5208 | Q32 | Never been and never had the opportunity. |
| 5855 | Q32 | Weather |
| 6867 | Q32 | Contracted hunting and fishing. |
| 6947 | Q32 | Waiting for business trip. |
| 6992 | Q32 | We haven't got back from our vacation. |
| 7093 | Q32 | Have not planned it out yet. |
| 7117 | Q32 | Not in plans. |
| 7400 | Q32 | No car right now. |
| 7681 | Q32 | Setting up timeshare. |
| 7892 | Q32 | Was in Montana the year before. |
| 8784 | Q32 | Never thought about it. |

| | | |
|-------|-----|-----------------------------------|
| 8926 | Q32 | No one to go motorcycling. |
| 9992 | Q32 | Heard about how crowded it was. |
| 10004 | Q32 | Wasn't planned. |
| 10077 | Q32 | Weather too cold now. |
| 10396 | Q32 | Recently found out about Montana. |

APPENDIX B – CALL OUTCOMES

The data described in this report were collected from September 8 through September 22, 1998. Interviewing was conducted weekdays from 5:30 p.m. until 9:15 p.m., Saturdays from 10:00 a.m. until 4:00 p.m., and Sundays from 2:00 p.m. until 8:00 p.m. (all respondent's local time).

A total of 13,471 dialings were made to complete 2106 interviews. The average length of the interview was about four minutes for non-visitors and seven minutes for visitors.

About one-third of all calls produced contact, with about 44% of those calls resulting in a completed interview. Slightly more than half of all calls produced no contact with the majority of those being calls to an answering machine.

| Call Outcome | Number of Dialings | Percent of Sub-Category | PERCENT OF ALL DIALINGS |
|---|--------------------|-------------------------|-------------------------|
| TOTAL DIALINGS | 13,439 | | |
| CONTACT | 4,795 | | 35.6% |
| Not complete: | | | |
| Initial Refusal | 1,008 | 21.0% | 7.5% |
| Did Not Qualify * | 1,626 | 33.9% | 12.1% |
| Mid-Termination | 55 | 1.1% | 0.4% |
| Completed interview | 2,106 | 43.9% | 15.6% |
| Number of calls resulting in a scheduled call back | 1,823 | | 13.5% |
| NO CONTACT | 6,851 | | 50.9% |
| No answer / busy | 2,280 | 33.3% | 16.9% |
| Answering Machine | 3,958 | 57.8% | 29.4% |
| Disconnected / Non working number | 613 | 8.9% | 4.6% |

* reason for disqualification include those who ordered travel information for a school project or other non-travel reasons, ordering travel information for someone else, or a respondent indicating that they did not request any travel information.

APPENDIX C – QUESTIONNAIRE

INTRO

Hello, my name is _____ of Clearwater Research, a professional marketing research firm. Our records show that you or someone in your household requested information about traveling to Montana – was it you?

[ASCERTAIN CORRECT PERSON, OR SCHEDULE A CALLBACK]

I would like to ask you a few questions about your request for travel information

YES - PRESS '1' TO CONTINUE

NO - <CTRL><END> TO SCHEDULE A CALLBACK OR TERMINATE.

Q1

Do you recall requesting any information about traveling to Montana, either by mail or by calling an 800 phone number?

- 1 YES
- 2 NO
- 3 DON'T KNOW / REFUSED -- **RE-ASK BEFORE CHOOSING**

[if answer = 1 continue, otherwise thank and terminate]

Q3

Did you receive the Montana Tourism information you requested?

- 1 YES
- 2 NO
- 3 DON'T KNOW / REFUSED

Q4

During the past year, did you take any trips of 200 miles or more outside of your home state?

- 1 YES
- 2 NO
- 3 DON'T KNOW / REFUSED

[if answer = 1 go to Q5 else "NO GO" skip to Q32 Part 2]

Q5

On those out-of-state trips of 200 miles or more, did you travel to or through Montana?

- 1 YES
 - 2 NO
 - 3 DON'T KNOW / REFUSED
-

[if answer = 1 go to Q6 else "NO GO" skip to Q32 Part 1]

For the following questions please think about your most recent trip to or through Montana.

Q6

Was Montana your PRIMARY vacation destination?

- 1 YES
 - 2 NO
 - 3 DON'T KNOW / REFUSED
-

Q7

Did you decide to travel to Montana before or after you requested the Montana travel information?

- 1 BEFORE
 - 2 AFTER
 - 3 DON'T KNOW / NO ANSWER
-

[if answer = 1 and Q3 = 1 go to Q9]

[if answer <> 1 and Q3 = 1 go to Q8]

[if answer in Q3 not = 1 go to Q20]

Q8

Did you decide to travel to Montana before or after you received the Montana information you requested?

- 1 BEFORE
 - 2 AFTER
 - 3 DON'T KNOW / REFUSED
-

Q9

Overall, how satisfied or dissatisfied were you with the Montana travel information you received? Would you say you were . . .

- 1 Extremely satisfied
 - 2 Somewhat satisfied
 - 3 Neither satisfied nor dissatisfied
 - 4 Somewhat dissatisfied, or
 - 5 Extremely dissatisfied
 - 6 DON'T KNOW / REFUSED
-

Q10

Did the information you received influence how long you stayed in Montana?

YES – Did it lengthen or shorten your stay?

- 1 LENGTHENED STAY IN MONTANA
 - 2 SHORTENED STAY IN MONTANA
 - 3 NO – THERE WAS NO EFFECT
 - 4 DON'T KNOW / REFUSED
-

Q20

Now I would like to ask a few questions about your MOST RECENT trip to Montana...

What was the PRIMARY purpose of this trip?
(DO NOT READ -- SELECT BEST ANSWER)

- 1 RECREATION & ACTIVITIES
- 2 SIGHTSEEING
- 3 RELAXATION & ESCAPE
- 4 VISIT HISTORICAL SITES / HISTORY MUSEUM
- 5 PERSONAL, SUCH AS: VISIT FAMILY OR FRIENDS/ FAMILY AFFAIRS / MEDICAL / FAMILY REUNION / WEDDING
- 6 BUSINESS, CONFERENCE, OR CONVENTIONS
- 7 JUST PASSING THROUGH
- 8 OTHER (SPECIFY)
- 9 DON'T KNOW / REFUSED

Q21

In which season did you visit Montana on your most recent trip?

- 1 WINTER
 - 2 SPRING
 - 3 SUMMER
 - 4 FALL
 - 5 DON'T KNOW / REFUSED
-

Q22

What form of transportation did you use to visit Montana?

- 1 AIR
 - 2 DRIVE BY VEHICLE (INCLUDES CAR, MOTORCYCLE, TRUCK, MOTORHOME, ETC.)
 - 3 BUS
 - 4 TRAIN
 - 5 OTHER (SPECIFY)
 - 6 DON'T KNOW / NO ANSWER
-

Q25

How many nights (OVERNIGHT) did you stay in Montana?

ENTER NUMBER OF NIGHTS: THEN PRESS <ENTER>

0 = NO OVERNIGHT STAYS
99 = DON'T KNOW / NO ANSWER

Q26

What accommodations did you use while visiting Montana on your most recent trip?
(DO NOT READ -- SELECT UP TO 5)

PROBE: Any others?

- 1 HOTEL OR MOTEL
 - 2 BED AND BREAKFAST
 - 3 RESORT
 - 4 RENTAL CONDOMINIUM OR HOME
 - 5 GUEST RANCH
 - 6 CAMPGROUND
 - 7 RV PARK
 - 8 HOME OF FRIENDS OR RELATIVES
 - 9 YOUR OWN VACATION OR SECOND HOME
 - 10 OTHER ACCOMMODATIONS (SPECIFY)
 - 11 NONE / NO OTHERS
 - 12 DON'T KNOW / REFUSED
-

Q27

While you were in Montana, about how much, on average, did you and your immediate traveling party spend **per day**. Please include lodging, food, purchases in stores, entertainment, and recreation. But, DO NOT include costs of traveling to Montana.

ENTER AMOUNT SPENT EACH DAY: THEN PRESS <ENTER>

99999 = DON'T KNOW / NO ANSWER

(CONFIRM AMOUNT IS "PER DAY" AVERAGE FOR ALL PEOPLE PUT TOGETHER – Probe:

"...and this amount: _____, is the per day average for all members of your traveling party?"

Q28

Overall, how satisfied or dissatisfied were you with your trip to Montana?

Would you say you were . . . ?

- 1 Very satisfied
- 2 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 4 Somewhat dissatisfied, or
- 5 Very dissatisfied
- 6 DON'T KNOW / NO ANSWER

Q29

How likely or unlikely would you be to take another trip to Montana?

Would you say you would be . . . ?

- 1 Very likely
- 2 Somewhat likely
- 3 Neither likely nor unlikely
- 4 Somewhat unlikely, or
- 5 Very unlikely
- 6 DON'T KNOW / NO ANSWER

[skip to Q33]

Q32

Why did you choose not to visit Montana during the past 12 months?

(IF Q4 > 1 question reads): Why did you not take any trips during the past 12 months?

(DO NOT READ -- SELECT UP TO 5)

**THESE ARE NOT READ
TO THE RESPONDENT**

PROBE: What else?

- 1 AIRLINE COSTS TOO EXPENSIVE
 - 2 COULD NOT AFFORD TRIP / OTHER FINANCIAL REASON
 - 3 DID NOT RECEIVE THE INFORMATION ABOUT MONTANA
 - 4 NO TIME FOR A TRIP
 - 5 PERSONAL OR FAMILY ILLNESS / PROBLEM
 - 6 MONTANA NOT ATTRACTIVE / INTERESTING
 - 7 VISITED ANOTHER LOCATION INSTEAD OF MONTANA
 - 8 OTHER (SPECIFY)
 - 9 NO REASON / NO OTHERS
 - 10 DON'T KNOW / NO ANSWER
-

[everyone rejoins here]

Q33

In the next two years would you say you . . .

- 1 Definitely will visit Montana
 - 2 Probably will visit
 - 3 Probably will not visit
 - 4 Definitely will not visit Montana
 - 5 DON'T KNOW / UNSURE / NO ANSWER
-

IF 1 or 2 go to Q34, else Q35

Q34

In which season would you return to Montana?

- 1 WINTER
 - 2 SPRING
 - 3 SUMMER
 - 4 FALL
 - 5 DON'T KNOW / REFUSED
-

Q35

In the past five years, how many times have you been to Montana to visit?

ENTER NUMBER OF TIMES: THEN PRESS <ENTER>
99 = DON'T KNOW / NO ANSWER

Q37

Montana has a large number of identified Lewis & Clark historic sites.

How interested would you be in a vacation that followed the Lewis & Clark Trail in Montana?

Would you say you . . . ?

- 1 Definitely would be interested
 - 2 Probably would be interested
 - 3 Probably would not be interested
 - 4 Definitely would not be interested
 - 5 DON'T KNOW / UNSURE / NO ANSWER / WHO IS LEWIS AND CLARK?
[we'll have an on-screen reminder for interviewers describing who Lewis & Clark were]
-

Q39

Do you use the Internet to access travel information or when making travel plans?

- 1 YES (IF YES, CONTINUE)
 - 2 NO (SKP Q50)
 - 3 DON'T KNOW/ CAN'T REMEMBER (SKP 50)
-

Q40

When using the Internet for making travel plans, at what point do you generally start searching the net for information? Would you say you start searching . . .

- 1 Less than 2 weeks before you travel
 - 2 2 – 4 weeks before you travel
 - 3 1 – 2 months before you travel
 - 4 more than 2 but less than 4 months before you travel, or
 - 5 more than 5 months before you travel
 - 6 DON'T KNOW/REFUSED
-

Q41

When searching the Internet for travel information, about how often do you return to the same web site to check for updated information? Would you say you . .

- 1 Return daily
 - 2 Return weekly
 - 3 Return monthly
 - 4 Return less often than monthly, or
 - 5 Never return
 - 6 DON'T KNOW/REFUSED
-

Q50

Finally, I have just a few questions for categorical purposes.
It may sound silly, but I need to ask and not guess -- are you a man or a woman?

- 1 MALE
 - 2 FEMALE
 - 3 REFUSED
-

Q51

How many children under the age of 18 do you have living at home?

ENTER NUMBER OF CHILDREN: THEN PRESS <ENTER>

8 = 8 OR MORE
9 = DON'T KNOW / NO ANSWER

Q52

What is your age, please?

ENTER AGE: THEN PRESS <ENTER>
99 = DON'T KNOW / NO ANSWER

Q53

What is the highest level of education you have completed?

(DO NOT READ)

- 1 LESS THAN HIGH SCHOOL
 - 2 HIGH SCHOOL
 - 3 SOME COLLEGE / TECHNICAL SCHOOL
 - 4 COLLEGE GRADUATE
 - 5 GRADUATE SCHOOL
 - 6 DON'T KNOW / NO ANSWER
-

Q54

And finally, please stop me when I read the range that comes closest to your total annual household income. . .

- 1 under \$20,000
 - 2 \$20,000 to just under \$40,000
 - 3 \$40,000 to just under \$60,000
 - 4 \$60,000 to just under \$80,000
 - 5 \$80,000 to just under \$100,000
 - 6 \$100,000 to just under \$120,000
 - 7 More than \$120,000
 - 8 DON'T KNOW / NO ANSWER
-

ENDQ

Those are all of my questions. Thank you for your time!
